

**my|CalPERS  
Readiness Guide**

**for**

**Direct Authorization Vendors**

**September 2011**

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## 1. INTRODUCTION

The new Web-based my|CalPERS system will launch in September 2011. The Public Employer Readiness Team (PERT) has prepared this *my|CalPERS Readiness Guide* as a tool to help your organization assess its readiness to conduct business utilizing the new my|CalPERS system. This document is one of several tools which will help your systems, business processes and staff to successfully transition to the new system.

This guide includes the educational and technical steps for both online reporters and file reporters. PERT recognizes that organizations may be either a file reporter or an online reporter, depending on their business needs. Therefore, this guide includes the readiness steps for both reporting types.

## 2. ONLINE REPORTERS

The following information pertains specifically to Direct Authorization Vendors (DAVs) who will provide their business data to my|CalPERS who have selected the online reporting method.

### 2.1 Educational Readiness

PERT continues to provide readiness support for all of its DAVs. Significant previous educational efforts to ensure DAVs are ready have included: assisting DAVs to select the reporting method that best suits their organization (August – October 2008) and providing information regarding changes in business policies and procedures (June – September 2009). Please visit the Business Partner area of CalPERS On-line, for a refresher on what you need to know to get ready for my|CalPERS.

The following table summarizes the educational readiness steps for online reporters:

√	my CalPERS EDUCATION STEPS	APPROXIMATE TIMEFRAME
<input type="checkbox"/>	Understands the Impacts of System Conversion	July - September 2011
<input type="checkbox"/>	Completed System Access Administrator activities	August - September 2011
<input type="checkbox"/>	Attended my CalPERS user training for DAVs	August - September 2011

## 2.2 Technical Readiness

Online reporters do not need to submit FTP files or upload files directly into my|CalPERS; therefore, there are few technical readiness steps. The key technical steps involve ensuring system users are able to log into the new my|CalPERS upon launch to enter or retrieve information.

The following table outlines the key technical steps required to be ready to use the new my|CalPERS when it is launched.

√	my CalPERS TECHNICAL STEPS	APPROXIMATE TIMEFRAME
<input type="checkbox"/>	Review and prepare for System Conversion (Cutover) activity freeze dates	July – September 2011
<input type="checkbox"/>	Successfully able to log into my CalPERS	September 2011
<input type="checkbox"/>	Successfully set up system users	September 2011

## 3. FILE REPORTERS

The following information pertains specifically to DAVs who will provide deduction requests and/or receive their deduction register to my|CalPERS using an electronic method (File Upload or FTP).

### 3.1 Educational Readiness

Significant previous educational efforts to ensure DAVs are ready have included: assisting DAVs to select the reporting method that best suits their organization (August – October 2008) and providing information regarding changes in business policies and procedures (June – September 2009). Please visit the Business Partner area of CalPERS On-line, for a refresher on what you need to know to get ready for my|CalPERS.

The following table summarizes the educational readiness steps for file reporters:

√	my CalPERS EDUCATION STEPS	APPROXIMATE TIMEFRAME
<input type="checkbox"/>	Identify System Access Administrator(s) and understand their role and responsibilities in my CalPERS	July – September 2011
<input type="checkbox"/>	Understands the Impacts of System Conversion	July - September 2011
<input type="checkbox"/>	Attended my CalPERS user training	August - September 2011

## 3.2 Technical Readiness

Technical Readiness refers to the technical steps that are required to ensure that a Business Partner is able to connect to my|CalPERS and submit correctly formatted files and/or receive the deduction register in XML format.

In addition to this guide, PERT has produced an online Technical Toolkit available at <http://www.calpers.ca.gov/pert> that outlines the technical elements and specifications for the files that are required for submission to the new my|CalPERS. In addition PERT has developed a File Readiness Alerts Page accessible at <http://www.calpers.ca.gov/pert> which provides the latest information relating to File Readiness testing.

The following table outlines the key technical steps required to be ready to use the new my|CalPERS when it is launched:

√	my CalPERS TECHNICAL STEPS	APPROXIMATE TIMEFRAME
<input type="checkbox"/>	Assess impact on internal systems	Ongoing
<input type="checkbox"/>	Make necessary changes to internal system	Ongoing
<input type="checkbox"/>	Successfully test connectivity with CalPERS (if FTP reporter)	May – September 2011
<input type="checkbox"/>	Load and verify Seed Data (Test and Production)	May – September 2011
<input type="checkbox"/>	Successfully transfer and validate test file	July – September 2011
<input type="checkbox"/>	Complete System Access Administrator activities for testing	July – September 2011
<input type="checkbox"/>	Receive notification of errors in test file (exception handling)	July – September 2011
<input type="checkbox"/>	Resolve and correct data errors in test environment	July – September 2011
<input type="checkbox"/>	Review and prepare for System Conversion (Cutover) activity freeze dates	July - September 2011
<input type="checkbox"/>	Successfully set up system users and assign user roles	September 2011 - ongoing

#### **4. ADDITIONAL ASSISTANCE**

PERT is dedicated to working with DAVs throughout this process and looks forward to addressing your questions and concerns about the transition.

For additional information, please see the Business Partner area of CalPERS On-Line at <https://www.calpers.ca.gov/>. If you have questions, please contact the CalPERS Customer Contact Center by calling our toll free number **888 CalPERS** (or **888-225-7377**)